

## Defining Meaningful Visits SOP 404.1



WASHINGTON  
**COURTS**

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April 5, 2012

TO: Certified Professional Guardian Board

FROM: Shirley Bondon, Manager, Court Access Programs

RE: Clarifying Standard of Practice 404

December 2011, a certified professional guardian (CPG) asked the Board through AOC staff to clarify who was responsible for performing meaningful in-person visits referenced in Standard of Practice 404, Contact with the Incapacitated Person. Staff submitted the request to the Regulations Committee. The Committee discussed the topic during its December meeting. The Committee was unable to agree on clarification and they agreed to present the questions below to the Board and seek the Board's guidance.

- Should certified professional guardian agencies be allowed to delegate visits to agency staff while individual certified professional guardians cannot?
- Who is responsible for visits-Any CPG? Individual CPG? Designated CPG?  
Other professionals? Qualified individuals? Employees of the CPG?  
Agents of the CPG? Staff of the CPG or CPGA?
- What qualifications should the individual responsible for visiting possess?  
Baccalaureate? Experience? Variation of CPG requirements?
- For continuity, must the same individual always visit the designated incapacitated person (IP)?

The Board discussed the issue in its January meeting. After discussion, the Board directed the Regulations Committee to reconsider the topic and return with a recommendation. The Regulations Committee met February 2012 and committee members agreed that the purpose of a visit was to gather information and assess IP's condition-physical appearance, living situation, services and health.

All members believed that individuals assigned to visit IPs should have knowledge of the general history of the IP and should be sensitive and sociable. Two members felt that the visitor should have other criteria such as:

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- Have the fiduciary duty/responsibility applicable to CPGs.
- Should be a certified professional guardian and thus will have met the same education and experience requirement as a CPG.

After discussion, the committee agreed to recommend the following:

**Allow both Individual and Agency CPGs to delegate the duty to visit to their employee.**